

## Chapter XI: View Patient Information

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***Scope of Data Entered***

Some data entered will carry across all patient visits and will not need to be re-entered. This information has a scope of All Available (AKA General ). For example, in the Patient Info Tab Comments, Prosthesis, Special Needs, Protocol Appts, and VAD Line Hx have a scope of General.

Some data entered will be limited to the current visit and will need to be re-entered each time the patient returns to NIH. This information has a scope of This Chart. For example, in the Patient Info Tab Comments, Advance Directives, Interpreter and Other have a scope of This Chart.

You can also view entered data for this visit (This Chart) verses all visits (All Available) in the Documents and Observations Tab by changing the filter.

- Charts will remain open (available for you to enter data) for 60 days after in patient discharge
- Charts will remain open (available for you to enter data) for 90 days for deceased patients.

***Patient Information Tab***

Documentation entered in the **Patient Information Tab** is used as a tool to communicate information with multiple departments. This function is used to view, enter and edit information. There are five data entry options available to you.

- Allergies
- Comments
- Care Provider
- Significant Event
- Height/Weight

Additional data displays that interfaces from MIS. This includes:

- Health Issues – the protocol number will come from MIS
- Address/Phones/Contacts – this data will be entered on admission and maintained in MIS.
- Demographics/Visit Data - this data will be entered on admission and maintained in MIS
- Financial/Employer – no data will display in the these fields
- Visit History - this data will be entered on admission and maintained in MIS

Summary View Description	Information Displayed
<b>Alerts</b>	Displays acknowledged and unacknowledged alerts for the selected patient. You can select details to view more information.
<b>Allergies/Comments</b>	Top portion of the window displays allergies documented for a patient. The bottom portion of the window displays both interfaced and entered data. Interfaced data includes: chief complaint, citizen information, mother and father's name, occupation, patient's maiden name. Data to be entered includes: advance directive information, interpreter, prosthesis, other, protocol appointments, special needs, VAD line history and local contact information.
<b>Care Providers</b>	Displays all physicians/providers directly related to the care of a patient (i.e. Admitting Physician, Ordering Physician, Consultant)
<b>Health Issues</b>	Displays the patient protocol (s).
<b>Significant Events</b>	Displays consents, isolation status, transfusion history, immunization history and tracheostomy.
<b>Address/Phones/Contacts</b>	Displays interfaced addresses, phone numbers and emergency contact data.
<b>Demographics/Visit Data</b>	Displays patient's address and visit data information interfaced from MIS.
<b>Financial Employer</b>	No data will be displayed.
<b>Visit History</b>	Displays history of visits (past and present) for a patient.

Table 1: Patient Info Summary Views

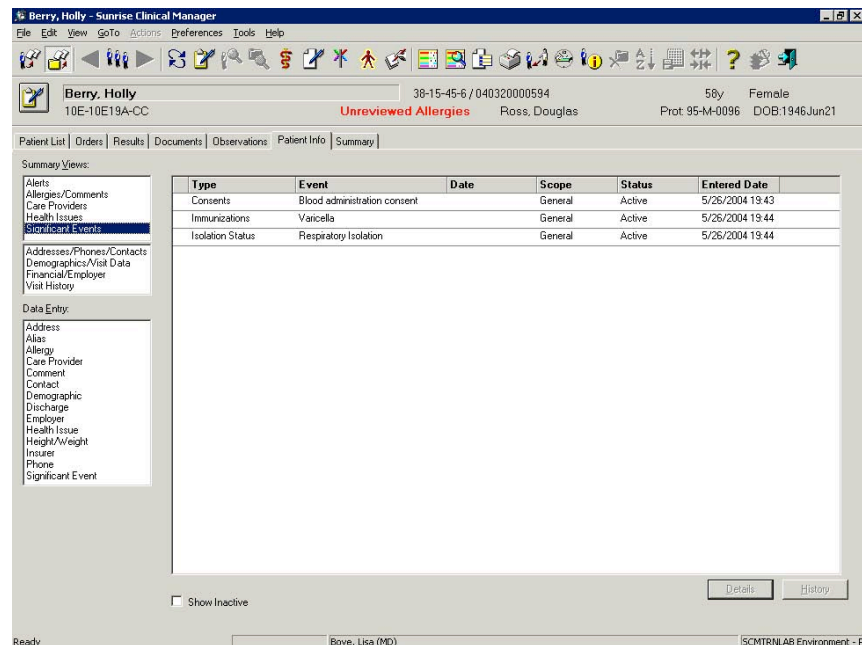
### ***Patient Info Chart Section***

The **Patient Info** chart section contains functions to help you view, edit, add, delete, or discontinue patient information related to demographics, visits and visit history, allergies, health issues, patient contacts, address and telephone numbers, discharge dates, height and weight, care providers, comments, and significant events.

Patient information can enter CRIS in one of two ways:

- ☐ From an interface to an admitting system (ADT).
- ☐ Directly, using CRIS.

To display the **Patient Info** chart section, click the **Patient Info** tab, or from the **GoTo** menu, select **Chart Section**, then **Patient Info**.



Screen 1: Patient Info tab

The **Patient Info** chart section contains a list of **Summary** views. You can click on a summary view to display a summary of the information you are interested in. If you want more detailed information or want to change the information, you can select an item in a summary view and click **Details**. You can click on one of the **Data Entry** options to view or change patient information.

### View Alerts

You can display **Alerts** for the selected patient by clicking on the **Alerts** summary view in the **Patient Info** chart section.

**Templar, Simon - Sunrise Clinical Manager**

File Edit View GoTo Actions Preferences Tools Help

Templar, Simon 7896541-23-65-4 / 654789654 28d Male  
10D-MICU\*01-CC Unreviewed Allergies Bove, Lisa

Patient List Orders Results Documents Observations Patient Info Summary

Summary Views:

- Alerts
  - Allergies/Comments
  - Care Providers
  - Health Issues
  - Significant Events
- Addresses/Phones/Contacts
  - Demographics/Visit Data
  - Financial/Employer
  - Visit History
- Data Entry
  - Address
  - Alias
  - Allergy
  - Care Provider
  - Comment
  - Contact
  - Demographic
  - Discharge
  - Employer
  - Health Issue
  - Height/Weight
  - Insurer
  - Phone
  - Significant Event

Type	Alert	Status	Priority	Date/Time
WARNING	Drug Interaction	Ack	HIGH	7/9/2004 16:34
WARNING	Drug Interaction	Ack	HIGH	7/9/2004 16:33
WARNING	Drug Interaction	Ack	HIGH	7/9/2004 16:33
WARNING	Drug Interaction	Ack	HIGH	7/9/2004 16:10
WARNING	Drug Interaction	Ack	HIGH	7/9/2004 15:52
WARNING	Duplicate Order	Ack	LOW	7/9/2004 15:52
WARNING	Drug Interaction	Ack	HIGH	7/8/2004 16:03
WARNING	Duplicate Order	Ack	LOW	7/7/2004 14:32
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:22
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:20
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:18
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:15
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:10
WARNING	Duplicate Order	Ack	LOW	7/7/2004 11:05
WARNING	Duplicate Order	Ack	LOW	7/7/2004 08:37
WARNING	Duplicate Order	Ack	LOW	7/6/2004 19:01
WARNING	Duplicate Order	Ack	LOW	7/6/2004 18:03
WARNING	Drug Interaction	Ack	HIGH	6/29/2004 09:52
WARNING	Duplicate Order	Ack	LOW	6/24/2004 15:28
WARNING	Duplicate Order	Ack	LOW	6/24/2004 15:28
WARNING	Duplicate Order	Ack	LOW	6/24/2004 15:28

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Screen 2: Alerts Summary View

## View Allergies and Comments

The top half of the **Allergies/Comments** summary view displays all active allergies that have been entered for the patient.

An icon in front of the **Reaction** column indicates that there is additional information to view about the allergy.



Screen 3: Information Icon

The bottom half of the **Allergies/Comments** summary view displays all active comments that have been entered for the patient.

**Berry, Holly - Sunrise Clinical Manager**

File Edit View GoTo Actions Preferences Tools Help

Berry, Holly 38-15-45-6 / 040320000594 58y Female  
10E-10E19A-CC Unreviewed Allergies Ross, Douglas Prot 95-M-0096 DOB:1946Jun21

Patient List Orders Results Documents Observations Patient Info Summary

Summary Views

Alerts  
Allergies/Comments  
Care Providers  
Health Issues  
Significant Events

Addresses/Phones/Contacts  
Demographics/Visit Data  
Financial/Employer  
Visit History

Data Entry:

Address  
Alias  
Allergy  
Care Provider  
Comment  
Contact  
Demographic  
Discharge  
Employer  
Health Issue  
Height/Weight  
Insurance  
Phone  
Significant Event

**Allergies**

Type	Allergy	Reaction	Confidence Level	Info Source	Status	Entered Date
Other	Needs Allergy As...	Unknown			Active	5/26/2004 08:25
Environmental	Latex or rubber	Hives	Suspected	Patient	Active	5/26/2004 19:38
Drug Category	sulfa drugs	Rash			Active	5/26/2004 19:38

☐ Show Inactive Review History Mark As Reviewed Details History

**Comments**

Type	Comment	Scope	Status	Entered Date
Chief Complaint	ALZHEIMER'S DISEASE	This Visit	Active	5/26/2004 08:25
HEADER1	Prot: 95-M-0096 DOB:1946Jun21	This Visit	Active	5/26/2004 08:25
Adv. Directives	Document is on chart	This Chart	Active	5/26/2004 19:42
Other	Four Points Sheraton 301.654.1000	This Chart	Active	5/26/2004 19:39
Citizen	USA	General	Active	5/26/2004 08:25
Father's Name	Thomas Reynolds	General	Active	5/26/2004 08:25
First Encounter	NONE	General	Active	5/26/2004 08:25
Mother's Name	Susan Reynolds	General	Active	5/26/2004 08:25
Occupation	Teacher	General	Active	5/26/2004 08:25

☐ Show Inactive Details History

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Screen 4: Allergies/Comments Window

Allergies are considered general in scope, meaning that they will display in any chart for the patient.

If an allergy or comment has been changed, an icon displays when you display the **Allergies/Comments** section in the **Patient Info** chart section. You can select the allergy or comment and click **History** to open the **Modification History** dialog box.



Screen 5: History icon

### To view an allergy:

1. In the **Patient Info** chart section **Summary Views** list, select **Allergies/Comments**.
2. Double-click an allergy, or select an allergy and click **Details**. The **Allergy Details** dialog box opens.
3. View or change information about the allergy in the **Allergy Details** dialog box.
4. Click **OK**.

### To view a comment:

1. In the **Patient Info** chart section **Summary Views** list, select **Allergies/Comments**.

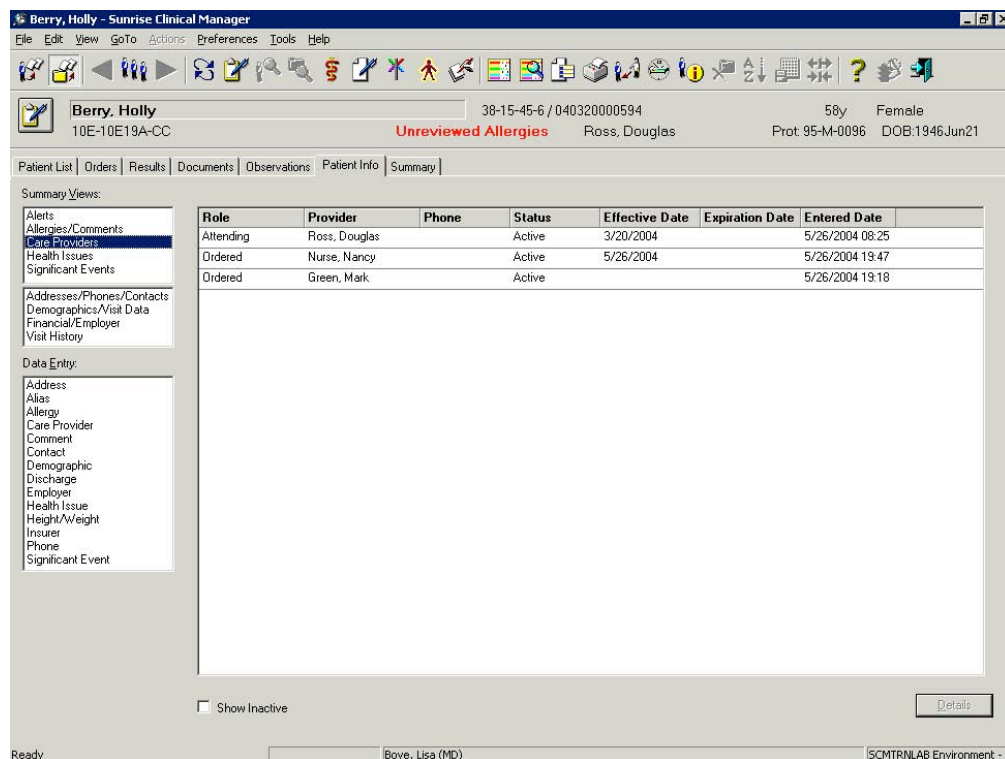
2. Double-click a comment, or select a comment and click **Details**. The **Comment Details** dialog box opens.
3. View or change the comment in the **Comment Details** dialog box.
4. Click **OK**.

### To view allergy history information:

1. From the **Patient Info** chart section **Summary Views** list, select **Allergies/Comments**.
2. Select an allergy, and click **Review History**. The **Allergy Review History** dialog box opens.
3. Review the information and click **Close**.

### View Care Provider Information

You can display care providers by clicking on the **Care Providers** summary view in the **Patient Info** chart section.

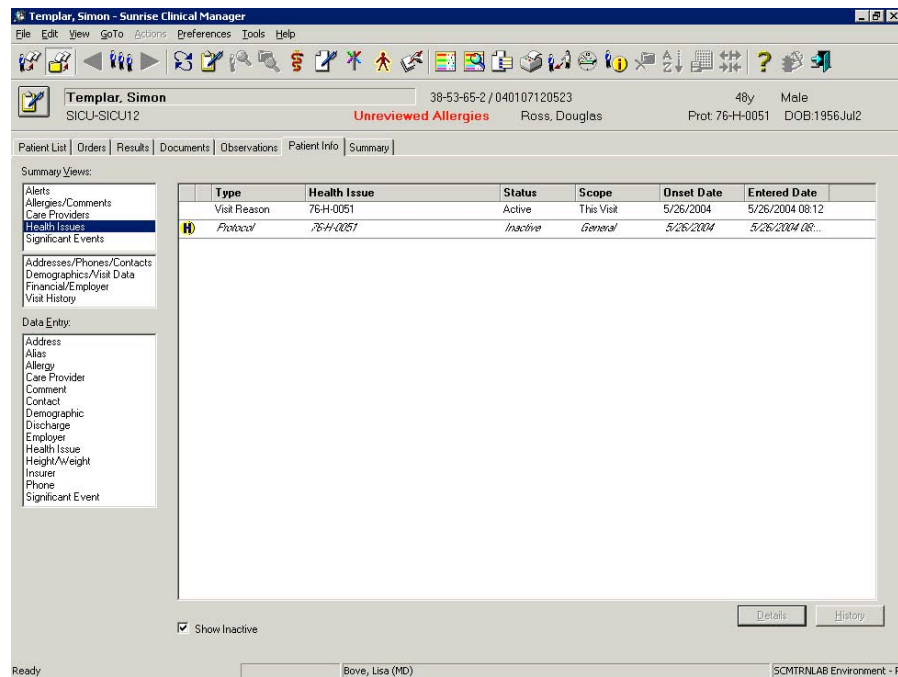


Screen 6: Care Providers Summary View

### View Health Issues

You can display health issues sorted by status and type, by clicking on the **Health Issues** summary view in the **Patient Info** chart section.

If a health issue has been changed, an icon displays when you display the **Health Issues** section in the **Patient Info** chart section.



**Screen 7: Health Issues Summary View**

You can select the health issue and click **History** to open the **Modification History** dialog box.

The 'Health Issue Details - Templar, Simon' dialog box is shown. It contains the following fields and controls:

- Type:** Protocol (dropdown)
- Status:** Inactive (dropdown)
- Scope:** General (dropdown)
- Coding Scheme:** Protocol (dropdown)
- Code:** 76-H-0051 (text field)
- Name:** Lipoprotein Metabolism in Normal Volunteers and Hyperlipoproteinemic Patients (text field)
- Search...** (button)
- Short Name:** 76-H-0051 (text field)
- Description:** (text area)
- Dates:**
  - Onset:** M/Y (radio button) or Full Date (radio button). Full Date: 5/26/2004 (calendar picker).
  - Expected Resolution:** (calendar picker).
  - Closed:** 7/12/2004 13:40 (calendar picker).
- Entered:** Bove, Lisa (MD) 5/26/2004 08:12 (text field)
- Last Modified:** Bove, Lisa (MD) 7/12/2004 13:39 (text field)
- Buttons:** Add New, Apply, OK, Cancel, Delete, Help.

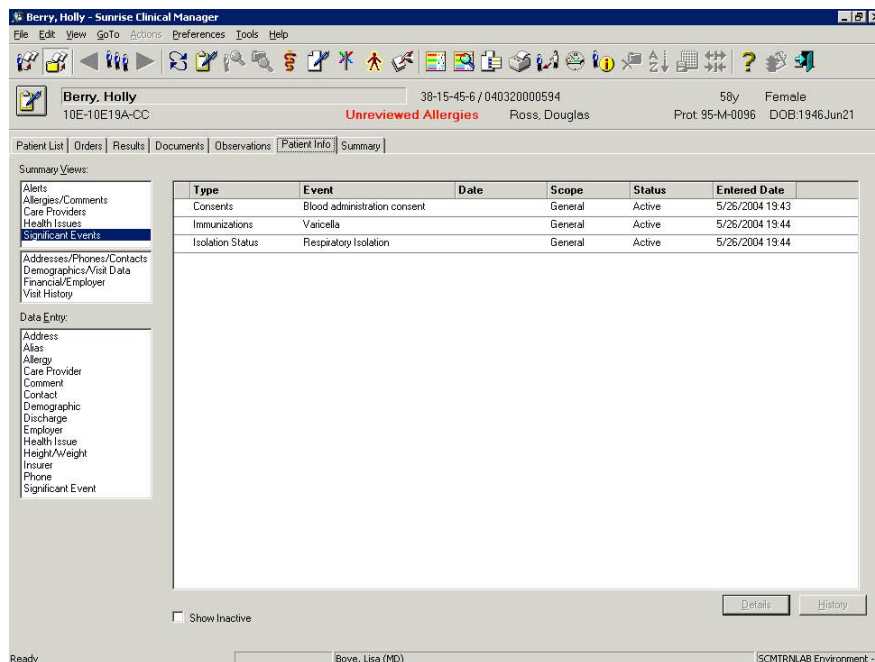
**Screen 8: Health Issues Detail window**

## View Significant Event Information

You can display a list of the patient's significant events (such as Immunization History) by clicking on the **Significant Events** summary view in the **Patient Info** chart section.

If a significant event has been changed, an icon displays when you display the **Significant Events** section in the **Patient Info** chart section.

You can select the significant event and click **History** to open the **Modification History** dialog box.



Screen 9: Significant Events Summary View

## View Addresses, Phone Numbers and Contact Information

The top part of the **Addresses/Phones/Contacts** summary view displays the patient's addresses.

The middle part of the **Addresses/Phones/Contacts** summary view displays the patient's phone numbers.

The bottom part of the **Addresses/Phones/Contacts** summary view displays the patient's contacts.

The screenshot displays the 'Berry, Holly - Sunrise Clinical Manager' interface. The patient information bar at the top shows 'Berry, Holly', '10E-10E19A-CC', '38-15-45-6 / 040320000594', '58y Female', 'Prot: 95-M-0096', and 'DOB: 1946-Jun-21'. The 'Unreviewed Allergies' section is highlighted in red. The 'Patient Info' tab is selected, showing a summary view of the patient's data. The left sidebar lists various summary views, with 'Address/Phone/Contacts' selected. The main area displays three tables: 'Addresses', 'Phones', and 'Contacts'. The 'Addresses' table shows a home address at 25 EVEREST STREET, BETHESDA, MD. The 'Phones' table shows a business phone at 301-555-5780 and a home phone at 301-555-5767. The 'Contacts' table lists emergency contacts: Thomas Reynolds (Father, 555-8826), Joseph Colbalt (Physician, 555-7000), James Sky (Physician, 555-7576), Margaret Smith (Sister, 555-8002), and an insurance contact (555-0177).

Type	Address	City	State/Province	Status
Home	25 EVEREST STREET	BETHESDA	MD	Active

Type	Area Code	Phone	Note
Business	301	555-5780	
Home	301	555-5767	

Type	Relationship	Name	Phone
Emergency	Father	Thomas Reynolds	555-8826
MD Report 1	Physician	JOSEPH COLBALT	555-7000
MD Report 2	Physician	JAMES SKY	555-7576
Near of Kin 1	Sister	MARGARET SMITH	555-8002
Near of Kin 2	Insurance	INSURANCE	555-0177

Screen 10: Address, Phone and Contacts Summary View

## View Demographic and Visit Data Information

The top half of the **Demographics/Visit Data** summary view displays demographic information about the patient, including the patient's age, gender, marital status, primary language, birth date, religion, and race.

The bottom half of the **Demographics/Visit Data** summary view displays information about the patient's visit data, including length of stay, admit date and time, and discharge information.

The screenshot displays the 'Berry, Holly - Sunrise Clinical Manager' interface, showing the 'Demographics & Visit Data' summary view for patient 10E-10E19A-CC. The patient information bar at the top is identical to the previous screen. The 'Demographics' section contains fields for Age (58y), Gender (Female), Marital Status (Widowed), Primary Language (English), Birth Date (6/21/1946), Religion (Atheist), and Race (Black). The 'Visit Data' section contains fields for Length of Stay (115d), Admit Date/Time (3/20/2004 00:00), Discharge Date/Time, Type/Care Level (Inpatient/Inpatient), Service (Undefined), and Location. The 'Details' button is visible at the bottom right of the form.

Demographics	
Age	58y
Gender	Female
Marital Status	Widowed
Primary Language	English
Birth Date	6/21/1946
Religion	Atheist
Race	Black

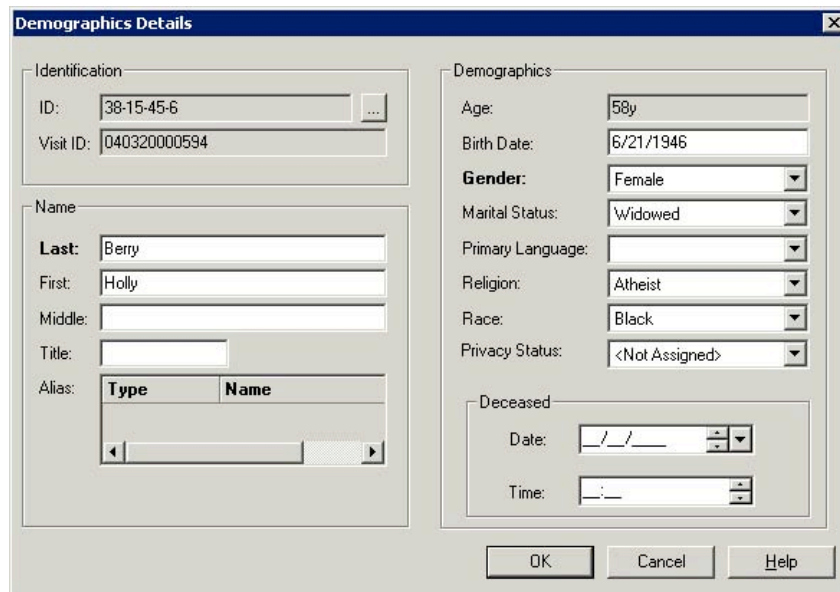
Visit Data	
Length of Stay	115d
Admit Date/Time	3/20/2004 00:00
Discharge Date/Time	
Type/Care Level	Inpatient/Inpatient
Service	Undefined
Location	

Screen 11: Demographics &amp; Visit Data Summary View

### View Visit History Information

You can display information on the patient's visit history by clicking on the **Visit History** summary view in the **Patient Info** chart section.

You can click **Details** to view the details of a visit.



The image shows a 'Demographics Details' dialog box with the following fields:

- Identification:**
  - ID: 38-15-45-6
  - Visit ID: 040320000594
- Name:**
  - Last: Berry
  - First: Holly
  - Middle:
  - Title:
  - Alias: 

Type	Name
- Demographics:**
  - Age: 58y
  - Birth Date: 6/21/1946
  - Gender: Female
  - Marital Status: Widowed
  - Primary Language:
  - Religion: Atheist
  - Race: Black
  - Privacy Status: <Not Assigned>
- Deceased:**
  - Date: / /
  - Time: : :

Buttons: OK, Cancel, Help

Screen 12: Visit History Summary View

### The Summary Chart Section

The **Summary** chart provides a quick overview of selected patient information. This information can be useful if you are seeing a patient for the first time, or are becoming familiar with your patient assignment.

Berry, Holly - Sunrise Clinical Manager

File Edit View GoTo Actions Preferences Tools Help

Berry, Holly 38-15-45-6 / 040320000594 58y Female  
10E-10E19A-CC Unreviewed Allergies Ross, Douglas Prot: 95-M-0096 DOB:1946Jun21

Patient List Orders Results Documents Observations Patient Info Summary

Active Allergies

Type	Allergy	Reaction	Entered D
Other	Needs Allergy Assessment	Unknown	5/26/2004
Environmental	Latex or rubber	Hives	5/26/2004
Drug Category	sulfa drugs	Rash	5/26/2004

Active Health Issues

Type	Health Issue	Onset Date	Entered D
Visit Reason	95-M-0096	4/19/2004	5/26/2004
Protocol	95-M-0096	4/19/2004	5/26/2004

Active Comments

Type	Comment	Scope	Entered Date
Chief Complaint	ALZHEIMER'S DISEASE	This Visit	5/26/2004
HEADER1	Prot: 95-M-0096 DOB:1946Jun21	This Visit	5/26/2004
Adv. Directives	Document is on chart	This Chart	5/26/2004
Other	Four Points Sheraton 301.654.1000	This Chart	5/26/2004
Citizen	USA	General	5/26/2004
Father's Name	Thomas Reynolds	General	5/26/2004
First Encounter	NONE	General	5/26/2004
Mother's Name	Susan Reynolds	General	5/26/2004
Occupation	Teacher	General	5/26/2004

Active Medications

Name	Summary	Stop Date
Morphine Sulf...	2 mg/mL 2 mg by intravenous push o...	
Acetaminophen	80 mg tablet, chewable mg none table...	
5% Dextrose ...	1000 ml by intravenous infusion IPota...	
Digoxin	0.125 mg tablet 0.125 mg (one tablet...	

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Screen 13: Summary Tab

